

## **Ten Easy Steps for the Project Director to Finalize the Scope of Work**

1. Use the Project Director Negotiation Log to keep track of dates (**Optional**).
2. Review the draft grant template provided by the Grant Manager (GM).
  - Compare the draft scope of work with the project proposal.
  - Determine if the scope of work reflects the project as proposed.
3. Any deviation from the scope of work proposed in the application requires State Water Board approval prior to negotiation. Should this occur, discuss the proposed changes with the GM. If the GM approves of the proposed deviation, the GM will provide a Request for Deviation Form. The PD must complete the form to justify the deviation before the scope is negotiated.
  - Before submitting a proposed deviation, be sure the changes result in an improved project.
  - Send Request for Deviation Form to GM. GM will facilitate the approval process and notify the PD of the State Water Board's decision.
4. Edit the draft scope of work provided by the GM using the strike-out and underline tracking feature in MS Word. E-mail your version of the back to the GM.
5. Discuss combined comments with GM in a two-way phone call. Adjust combined comments if needed to reflect anything new from the two-way call.
6. Send combined comments to the GM via e-mail.
7. Discuss combined comments with GM and PA in a three-way call. Project Director is responsible for final draft. During this call, set a date the final draft will be provided.
8. Repeat 4 – 7 as needed with revised drafts until all agree on a final scope. It may take several rounds of “receive-review-revise” to get a final scope. Send final draft scope of work to GM via e-mail.
9. Wait for the PA to process the remaining paperwork needed to execute the Grant Agreement. The PA will mail four copies of the final Grant Agreement to the Project Director to facilitate signature. The Project Director will receive an executed copy in the mail.
10. While PA is processing the final paperwork, ensure you are scheduled on the next Board agenda to get approval for signature of the grant agreement and to obtain the Board Resolution (when applicable).

## Common Problems

1. Draft scope of work in the proposal is poorly written and tasks are badly explained.
  - This is pretty easy to fix by revising fuzzy language or re-organizing work items.
  - Final scope should be clear enough for someone not otherwise knowledgeable of the project to understand what's being done, as well as why, how, where, and when.
2. Draft scope of work in the proposal lacks specifics as to how many, how often, etc.
  - Add minimum standards where appropriate, e.g., "at a minimum, 15 volunteers will be recruited" or "a minimum of 10 workshops will be given."
  - "Work to be Performed" and "Table of items for Submittal" should be specific enough to avoid misunderstandings and allow the GM to determine whether a task has been adequately completed for payment of the invoice.
3. The draft grant agreement provided by the State Water Board does not reflect potential changes to the project scope of work that may have occurred after the proposal was submitted for funding.
  - State Water Board approval is required for any deviation from the proposed scope of work before negotiations can continue.
  - Final scope of work should be at least as good, if not better, than what was proposed.